

9 STEPS TO **Mastering the Basics**

Version 3.00 | Novtel Copyright 2014

VEHICLE HIRE

Table of Contents

Part I Getting started	3
Part II Key Features of Novtel Vehicle Hire	7
Part III Mastering the Basics	8
1 Step 1 - Creating your fleet.....	9
2 Step 2 - Creating Categories.....	12
3 Step 3 - Create your rates.....	14
4 Step 4 - Bookings with Novtel.....	19
Reports and Search Options	30
5 Step 5 - Novtel Documents.....	34
6 Step 6 - Novtel and the financial side of things.....	35
7 Step 7 - Setting up a Company.....	37
8 Step 8 - How to Set-Up Multi-Branch Management.....	38
9 Step 9 - How to Set-Up Branches and their Colours.....	40
Part IV Novtel Products	42

1 Getting started

Downloading and installing

www.novtel.com/products/vehicle-hire/

Home About Us Products Modules Services Acquire Support Blog Forum Contact Us Training Jobs

NOVTEL Sage Pastel **tpn**
Software Solution Partner Microsoft Partner

Vehicle Hire

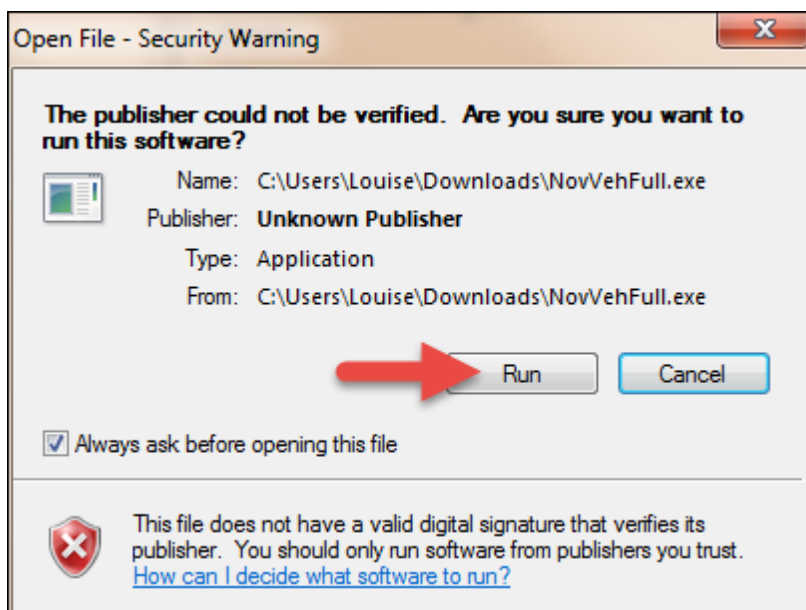
Info Features Requirements Screenshots Testimonials Request Demo Free Version **Download** e-Learning

Free Product Download

- Getting Started: 9 Steps To Mastering Novtel Vehicle Hire Basics (PDF) [Start free download now](#)
- Vehicle Hire Full Installation [Start free download now](#) (Includes Free Lite and Full Professional version)

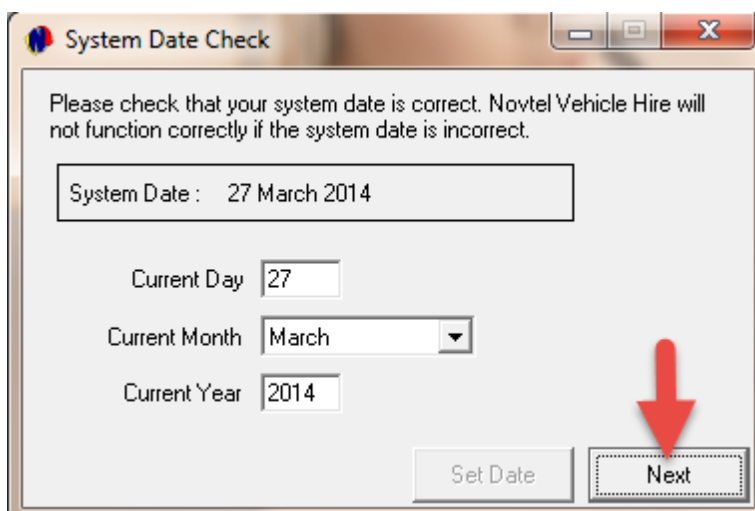
We strongly advise that there is a backup of data before any upgrade begins. If your database version is older than 4.0.0.0, please contact Novtel Support. For release notes and issues resolved on this upgrade, please visit the Novtel [blog](#).

- Latest Upgrade [Download now](#)





- Click on "**I accept the terms in the license agreement**", and then "**Next**", and "**Next**" again, to install the program in a specific folder on your computer.
- Your software will now install.
- Click on "Finish" when prompted to do so.
- Now click on Novtel Vehicle Hire on the desktop where the icon has been created.
- The program will ask for a "**System Date Check**".



Please Enter Registration Details

Registered Name **1** Your name or Company Name

Serial Number **2** SV9999

3 Accept

Cancel

If you have not received a serial number

Tel : +27 (0) 861 NOVTEL (668835)
Fax : +27 (0) 44 695 4300
Email : Registrations@novtel.com

Enter this serial number for the Free Version

- Enter Name; Surname; Company; E-mail details (for an e-mail will be send with an code to be entered, in order to activate the program) and enter your Cellphone number to receive three free online support credits.

Free Lite Registration Renewal

Novtel Vehicle Hire Lite
Please complete the following form to register your product:

First Name ★

Surname ★

Company ★

Email ★

Cellphone ★

A SMS activation will be sent to this number, awarding you with 3 FREE support credits!

Comments

Limits

Vehicles	35
Bookings	Unlimited
POS Transactions	2000
Works Orders	Unlimited

Rate Our Product

☺ ☺ ☹ ☹ ☹

Help us keep the Lite Version free by making a donation:

Donate

Registrations Skipped: 0 (maximum 10)

Upgrade **Register Later** **Register**

Free Lite Registration Renewal

**Thank You For Registering
Novtel Vehicle Hire**

In order to ensure your email is valid, an activation code has been emailed to:
francois.vlok@telkomsa.net

If you have trouble locating the email, please check your spam folder or click the button below to send the activation email again:

Resend email

Once you have received your activation code, enter it into the area below and click Activate.

Activation Code:

Registrations/Activations skipped: 0 (maximum 10)

Activate Later **Activate**

- Should you encounter the following screen, the problem could be that you are not connected to a network. Click "**Register Later**", and you will be able to work. Please contact Novtel for an activation code.

Free Lite Registration Renewal

Novtel Vehicle Hire Lite

No registration servers could be contacted.
Please check your Internet Connection or
contact Novtel Support on 0861 66 88 35

Registrations/Activations Skipped: 1 (maximum 10)

Upgrade **Register Later**
Exit Application

2 Key Features of Novtel Vehicle Hire

- Fully automated rate structures are calculated when reservations are made
- Powerful grid view of reservations for up to 5 years
- Automated commission management system (Full version only)
- Amend bookings with ease in seconds and have control of the related staff activity
- Complete Vehicle maintenance system to control your fleet damages and repairs
- Manage vehicle movements between branches with the click of a button
- Extensive customer features including generating rental agreements, delivery notes and invoices
- An integrated forms designer to customize stationary and all printed documents
- Search customer history and contracts
- Security and access control let's you customise user permissions and passwords and record user activity

Automated colour-coded grid status tracking occurs as follows:

- Cancelled (Bookings can be cancelled but cannot ever be deleted)
- Provisional (Booking made but not yet confirmed)
- Confirmed (Holding deposit or bond recorded against credit card)
- On-Rent (Vehicle was handed over to the customer)
- Termed (Vehicle was returned by the customer)
- Non-Rev (No charge for the booking made)

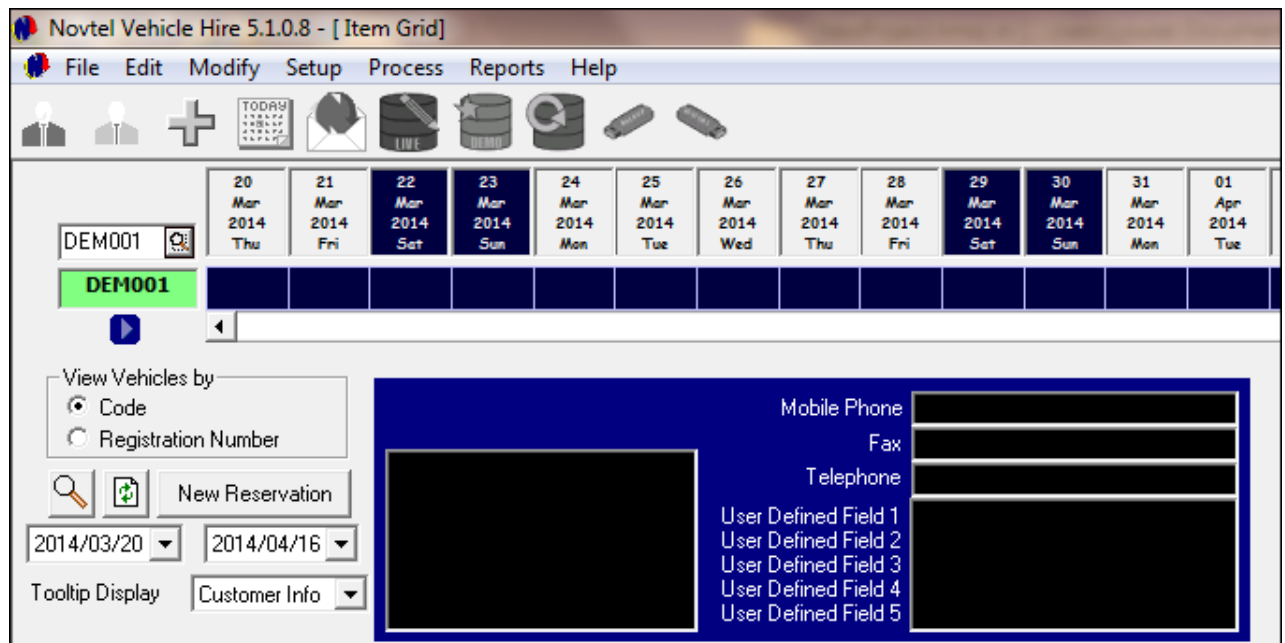
3 Mastering the Basics

For demonstration purposes of this tutorial, please note the following:

- Sales Tax \ GST \ VAT is set at 14% - The South African VAT Rate
- Novtel is set to run independently – interfaced with no 3rd party software
- Bookings are set to overlap by one day
- Vehicle return grace period is set at 2 hours
- Kilometers are used, but can be easily changed to Mileage in "**Company Set-Up**"

You have the option to choose between the Demo Database (Loaded by Default) or the Live Empty Database. See the following 2 Images:

Empty Data Base when the program is newly installed:



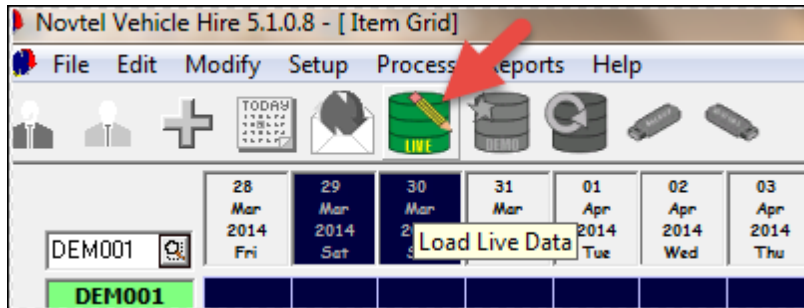
Demo Database:

	01 Apr 2014 Tue	02 Apr 2014 Wed	03 Apr 2014 Thu	04 Apr 2014 Fri	05 Apr 2014 Sat	06 Apr 2014 Sun	07 Apr 2014 Mon	08 Apr 2014 Tue	09 Apr 2014 Wed	10 Apr 2014 Thu	11 Apr 2014 Fri	12 Apr 2014 Sat	13 Apr 2014 Sun	14 Apr 2014 Mon	15 Apr 2014 Tue
A001					Engelbrecht, Angela Mrs										
A001	son, Jake Mr				Status : Confirmed										
A002															
A003															
A004															
A005															
A006															
A007															
A008															

3.1 Step 1 - Creating your fleet

We will use the Live Empty Database for this Tutorial. This free version can only accommodate 35 cars.

- Click on the green "Load Live Data" icon.



Fleet numbering must be planned carefully and is very important.

Let's say we have 3 types of cars:

Group A (15 cars)

1300 Car - no air-con
Class: Economical
Codes: A001 – A015

Group B (11 cars)

1600 Car - air-con
Class: Value
Codes: B001 – B011

Group C (5 cars)

3000 Luxury vehicle
Class: Luxury
Codes: C001 – C005

Novtel will group all the vehicles together on the grid.

To add a vehicle: Click **Edit** → **Vehicle** → **Add New**

Novtel has an automatic Fleet Create Function and for this feature to work, Novtel needs at least 3 Numeric characters (e.g. 001) after the Alpha character (e.g. A) in the code.

Now create the first vehicle:

1. In the Code line, type A001.
2. Use the Tab key or mouse to move to the next line.
3. In the "Description" line, type the following: Car no air-con 1 (this can later be edited to name all the cars correctly).
4. Click "**Accept**" to save the vehicle.

There are much more info to be completed on the fleet master file, but it is all self explanatory.

See the following diagram on how to use "**Auto Create**." Remember to type in the number of cars in each group to "**Auto Create**" when prompted to do so.

Vehicle Setup

Code	Description
A001	Car No Air-con 1
DEM001	Only for Demo you can Delete th

Select the car in order to Auto Create the Group

Code: A001 Cost Price: 0.00

Category: Rental per day (Excl): 0.00

Registration Number: CA999 Tax: 0.00

Auto Create Rental per day (Incl): 0.00

Supplier Code: Description: Replacement Value: 0.00 Date Of Purchase: 2014/03/28

Description: Car No Air-con 1 Branch: Demo, South Africa

Add New Edit Delete Close

To edit vehicles is very easy. Double click on the vehicle; make changes (rename the vehicle in the "**Description**" line) and click "**Accept**" to save changes and close.

You can now create the rest of the demo fleet (vehicles of group B and C) as described above.

All that is left to do now, is to "**Refresh**" the system with the new vehicles.

It is located on the grid, between the "**Search**" and "**New Reservation**" button, and above the dates.

View Vehicles by

☒ Code

☐ Registration Number

New Reservation

2014/03/28 2014/04/24

Tooltip Display: Customer Info

User []
User []
User []
User []
User []

At any stage, if you want to remove all data and start again, you can select the red **"Start Over"** icon.



3.2 Step 2 - Creating Categories

Categories must be planned and structured well before attempting to load them into the Novtel system.

As with Step 1, we have Group A, B and C vehicles. For each of these groups, there are different price structures.

We will now create the codes for the different groups, and the relevant data pertaining to each group. For example: Group A, B & C have the following rate structures per days of usage:

Group A

Create Code	A1	A2	A3	A4
Rental period	A 1-7 Days	A 8-14 Days	A 15-21 Days	A 22-28 Days
Rental per day	65.00	62.00	60.00	58.00
Insurance per day	15.00	14.00	13.00	12.00
Contract fee	10.00	10.00	10.00	10.00
Free KM \ MI	100	120	150	170

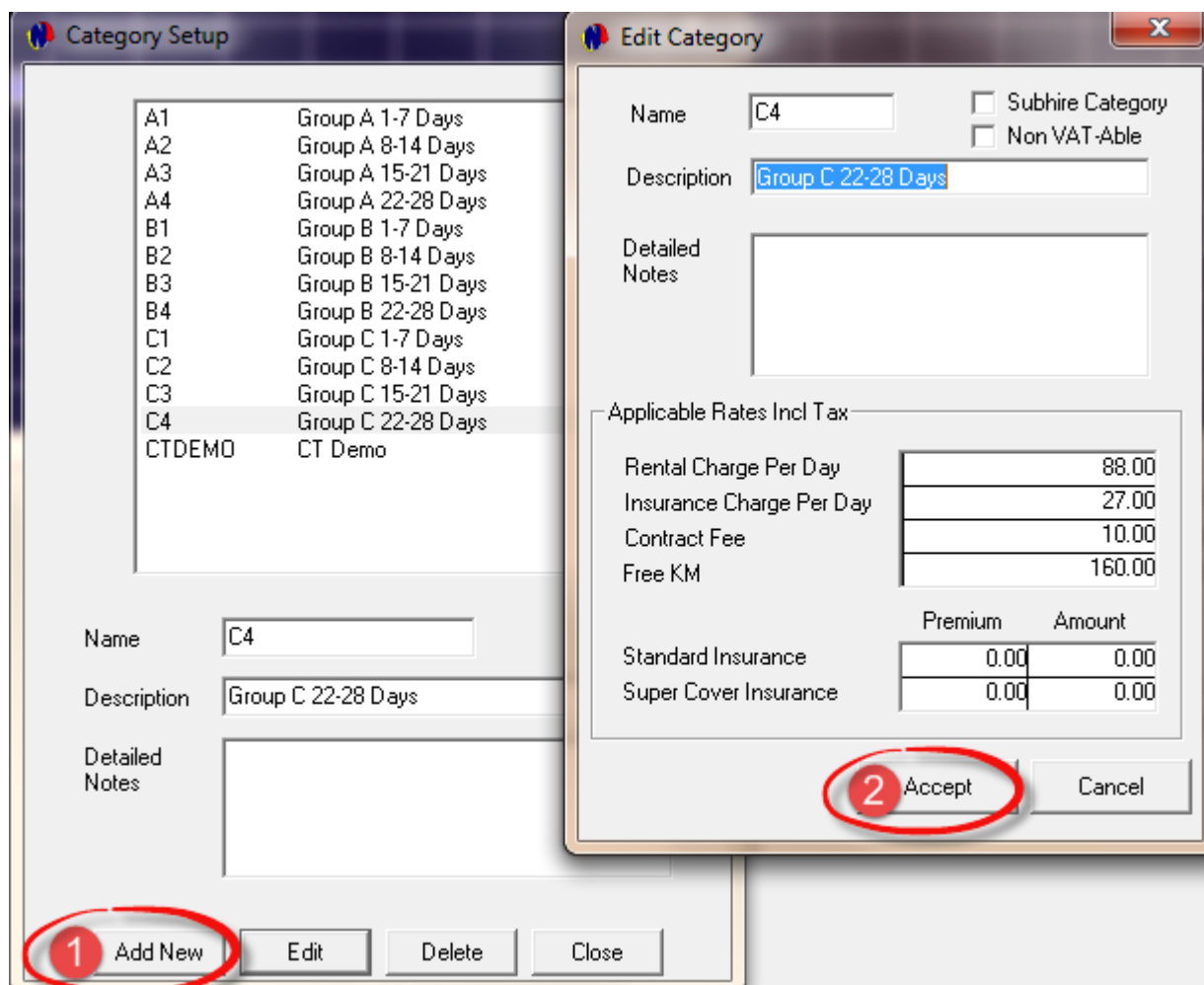
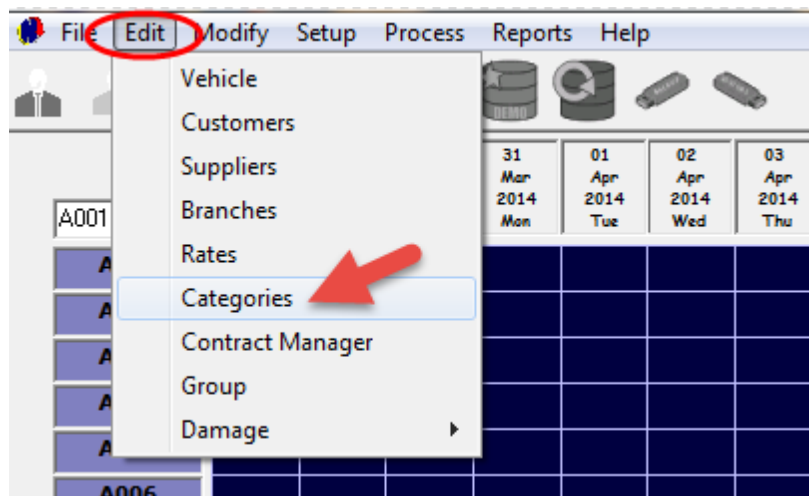
Group B

Create Code	B1	B2	B3	B4
Rental period	B 1-7 Days	B 8-14 Days	B 15-21 Days	B 22-28 Days
Rental per day	75.00	72.00	70.00	68.00
Insurance per day	20.00	19.00	18.00	17.00
Contract fee	10.00	10.00	10.00	10.00
Free KM \ MI	100	120	150	170

Group C

Create Code	C1	C2	C3	C4
Rental period	C 1-7 Days	C 8-14 Days	C 15-21 Days	C 22-28 Days
Rental per days	95.00	92.00	90.00	88.00
Insurance per day	30.00	29.00	28.00	27.00
Contract fee	10.00	10.00	10.00	10.00
Free KM \ MI	120	140	150	160

Now: Click on **Edit** → **Categories** → **Add New**

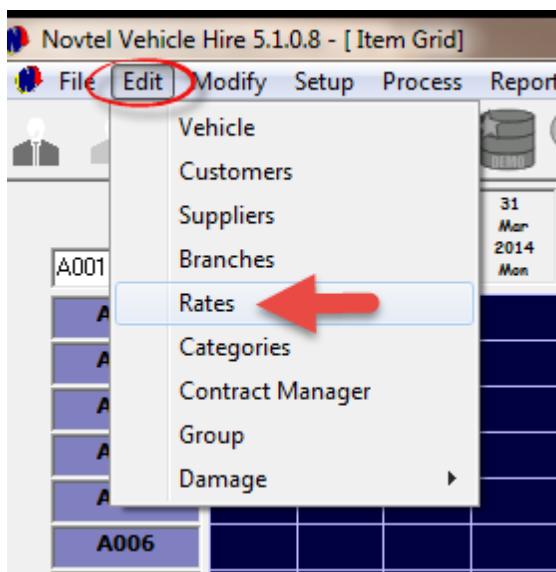


3.3 Step 3 - Create your rates

The following charges can be added unto the daily rental charges in a typical Vehicle Hire Business:

- | | |
|-----------------------------|-------------------------|
| 1.1) Contract charge | 1.8) Roof rack |
| 1.2) Excess KM \ MI charges | 1.9) Tyre damage |
| 1.3) Basic insurance | 1.10) Windscreen damage |
| 1.4) Additional insurance | 1.11) Fuel Charge |
| 1.5) Other insurance | 1.12) Pick-up fee |
| 1.6) Body damage charge | 1.13) Drop-off fee |
| 1.7) Baby seat rental | |

Rates must be planned well and structured on paper before attempting to load them into the Novtel Vehicle Hire system.



In a typical Vehicle Hire Company, there might be a different contract charge for each group.

In this example however, we have only one contract charge for all the groups, but we have different rates for Excess KM \ MI Charges, Insurance, Pick-up and Drop-Off fees.

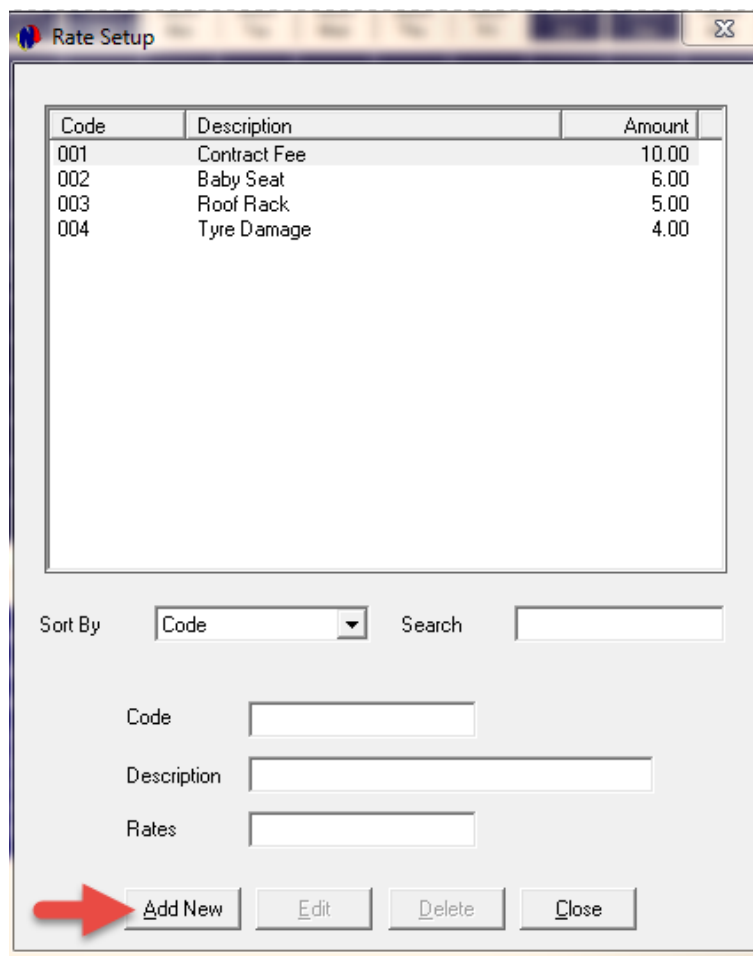
The rates, as set out on paper, will typically look more or less like the following example:

Standard rates that apply to all groups in the Hire Business:

Create Code Description

001	Contract fee:	Charge per contract	R10.00
002	Baby seat:	Rental Charge per day	R 6.00
003	Roof rack:	Rental Charge per day	R 5.00
004	Tyre Damage:	Charge per tyre	R55.00
005	Body Damage:	Charge per damage	R90.00

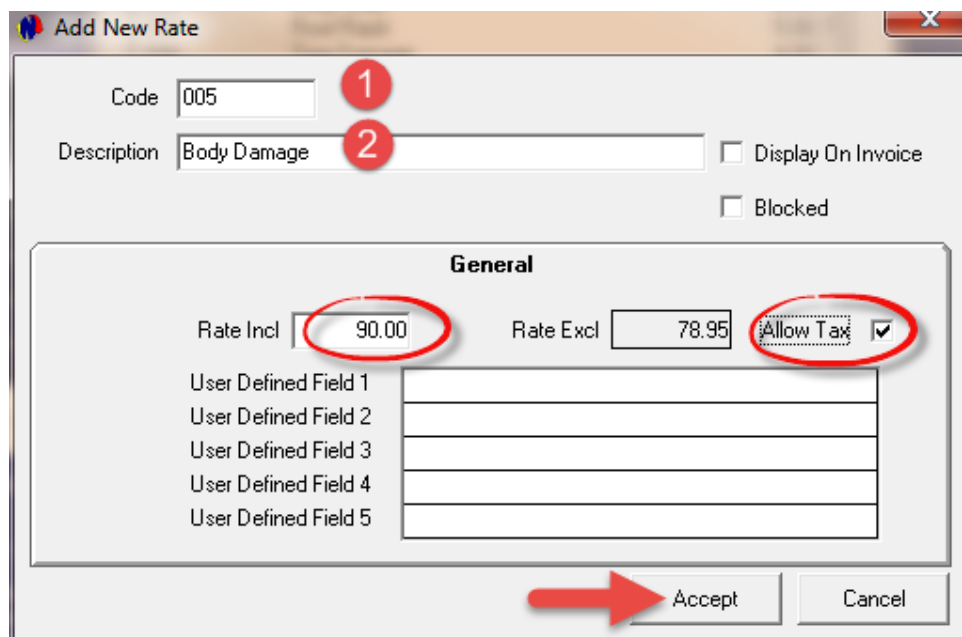
Click **Edit** → **Rates** → **Add New**



The Rate Setup dialog box displays a table with the following data:

Code	Description	Amount
001	Contract Fee	10.00
002	Baby Seat	6.00
003	Roof Rack	5.00
004	Tyre Damage	4.00

Below the table, there are input fields for Code, Description, and Rates, and a Sort By dropdown menu set to Code. A red arrow points to the **Add New** button.



The Add New Rate dialog box shows the following fields and options:

- Code: 005 (marked with a red circle 1)
- Description: Body Damage (marked with a red circle 2)
- Display On Invoice: ☐
- Blocked: ☐
- General** section:
 - Rate Incl: 90.00 (circled in red)
 - Rate Excl: 78.95
 - Allow Tax: ☒ (circled in red)
 - User Defined Field 1 to 5: empty text boxes

A red arrow points to the **Accept** button.

Novtel Vehicle Hire sorts and groups Multiple Rates most effectively this way:

Excess KM/MI charges

Enter the codes the same way as described in the last image of the previous page.

Let's Call Excess KM \ MI = **A** – then apply how we coded the categories.

Group A in the standard rates

Create Code	AA1	AA2	AA3	AA4
Rental period	1-7 Days	8-14 Days	15-21 Days	22-28 Days
Free KM \ MI Allowed per day	100	120	150	170
Excess Charge Per KM \ MI	1.20	1.15	1.10	1.00

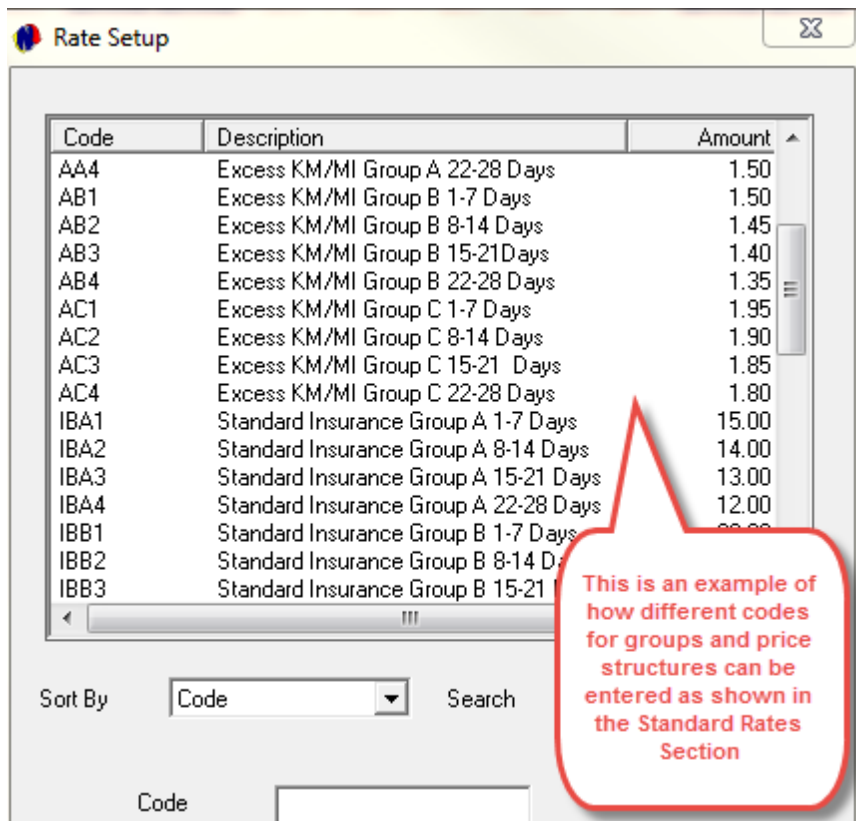
Group B

Create Code	AB1	AB2	AB3	AB4
Rental period	1-7 Days	8-14 Days	15-21 Days	22-28 Days
Free KM \ MI Allowed per day	100	120	150	170
Excess Charge Per KM \ MI	1.50	1.45	1.40	1.35

Group C

Create Code	AC1	AC2	AC3	AC4
Rental period	1-7 Days	8-14 Days	15-21 Days	22-28 Days
Free KM \ MI Allowed per day	120	140	150	160
Excess Charge Per KM \ MI	1.95	1.90	1.85	1.80

In the "**Description**" line for each of the groups, enter: Excess KM\MI, followed by the group and the rental days.



In the above manner, you can create all the codes for the Insurance, Pick-up and Drop Off charges, as explained per the following:

Insurance charges

Lets Call *Standard Cover Insurance = IB*

In the "**Description**" line for each of the groups, enter: "Standard Insurance", followed by the group and the rental days: (*Example: Standard Insurance A 1-7 Days*)

Lets Call *Super Cover Insurance = IS*

In the "**Description**" line for each of the groups, enter: "Super Cover Insurance", followed by the group and the rental days:

Group A

Rental period	<u>1-7 Days</u>	<u>8-14 Days</u>	<u>15-21 Days</u>	<u>22-28 Days</u>
Create Code	IBA1	IBA2	IBA3	IBA4
Standard Insurance per day	15.00	14.00	13.00	12.00
Create Code	ISA1	ISA2	ISA3	ISA4
Super Cover Insurance per day	27.00	26.00	25.00	24.00

Group B

Rental period	<u>1-7 Days</u>	<u>8-14 Days</u>	<u>15-21 Days</u>	<u>22-28 Days</u>
Create Code	IBB1	IBB2	IBB3	IBB4
Standard Insurance per day	20.00	19.00	18.00	17.00
Create Code	ISB1	ISB2	ISB3	ISB4
Super Cover Insurance per day	37.00	36.00	35.00	34.00

Group C

Rental period	<u>1-7 Days</u>	<u>8-14 Days</u>	<u>15-21 Days</u>	<u>22-28 Days</u>
Create Code	IBC1	IBC2	IBC3	IBC4
Standard Insurance per day	30.00	29.00	28.00	27.00
Create Code	ISC1	ISC2	ISC3	ISC4
Super Cover Insurance per day	44.00	43.00	42.00	40.00

Pick-up fees and Drop-off fees charged per Kilometer \ Mileage Range from location

Now the question is: How are we going to implement these rates in such a way that it is logical and easy to use for the staff members of this trade?

First, the Rates that apply to all the groups:

Lets call "Drop-off" = TD

(T for transport and D for Drop-off - then apply how we coded the categories)

TD1	Drop-off 1 to 10 KM \ MI	20.00
TD2	Drop-off 11 to 20 KM \ MI	30.00
TD3	Drop-off 21 to 30 KM \ MI	40.00
TD4	Drop-off 31 and More KM \ MI	60.00

Lets call "Pick-up" = TP

(T for Transport and P for Pick-up - then apply how we coded the categories)

TP1	Pick-up 1 to 10 KM \ MI	20.00
TP2	Pick-up 11 to 20 KM \ MI	30.00
TP3	Pick-up 21 to 30 KM \ MI	40.00
TP4	Pick-up 31 and More KM \ MI	60.00

You can create more codes for "Drop-Off" and "Pick-up" charges, since the distances can be extremely varied.

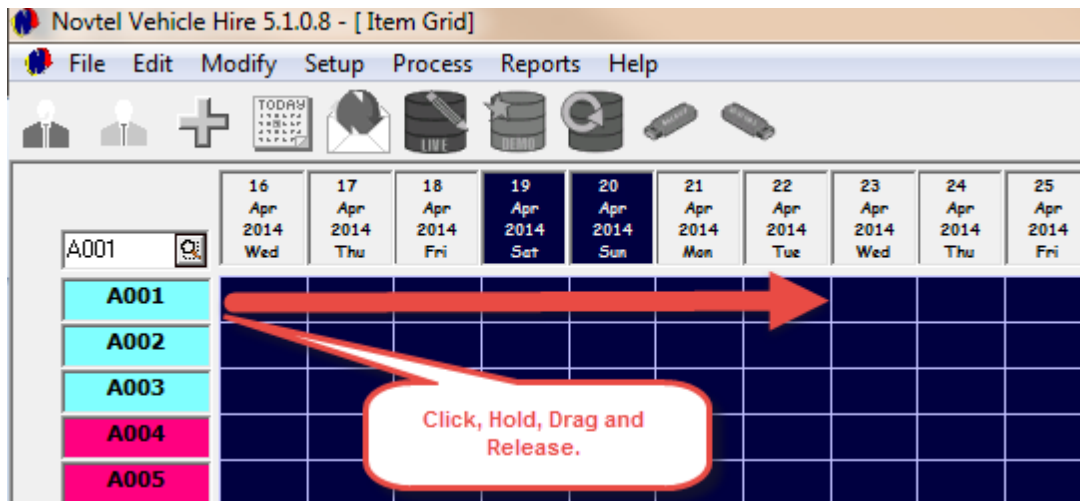
So now that all the codes are entered, and we are ready to start making bookings.

3.4 Step 4 - Bookings with Novtel

To make bookings are as easy as point, click, hold and drag. With Novtel all work is done directly on the grid.

Lets make the first booking for car A001, for one week.

Hold the mouse key down on the starting date of the booking, and drag to the date of return. Release the mouse.



The Client List screen automatically pops up.

To create our first customer, click on **"Add New"**.

Reservation Details

General Financial Additional Costs Additional Drivers Quick View

Customers

Number	Description	Telephone	Fax
SMI001	Smith, William Mr	012 222 3333	

Refresh Add New Edit

Search: ☐ Number ☐ Description 1 Select Close

Remarks: Status: Provisional

2 Accept Cancel

	16 Apr 2014 Wed	17 Apr 2014 Thu	18 Apr 2014 Fri	19 Apr 2014 Sat	20 Apr 2014 Sun	21 Apr 2014 Mon	22 Apr 2014 Tue	23 Apr 2014 Wed
A001	11 Smith, William Mr							
A001								
A002								
A003								

When Novtel Vehicle Hire runs interfaced with 3rd party software, the customer we have just created will automatically be created in the 3rd party accounting software package. In fact, Novtel uses the exact same database as the 3rd party software, so if a customer is created in the 3rd party accounting software, the customer will also appear in Novtel.

To look at a booking's information is easy. Point the mouse at the booking on the grid and double click on it. Let's recall Mr Smith's booking.

On the "**General**" Tab, see how Novtel has already calculated the booking's duration when we made the booking.

Directly under the "**Duration Charge**" line is the "**Category**" selection. Click on the search magnifying glass on the right and then select the category.

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A001 | Volkswagen Golf 1300 Red | Duration Charged: 6

Reservation Number: 11 | RA Number: 0 | Category: [dropdown]

Order Number: [empty]

Customer Code: SMI001 | Search <F5>

Description: Smith, William Mr

Branch Out: ☒ Demo, Europe | Date Out: 2014/04/16

This booking belongs to Code: A1 - Group A 1-7 Days.

Set the Status to **"Provisional."**

Select Category

Code	Description	Price Inc	Price Excl	Tax
A1	Group A 1-7 Days	65.00	57.02	7.98
A2	Group A 8-14 Days	62.00	54.39	7.61
A3	Group A 15-21 Days	60.00	52.63	7.37
A4	Group A 22-28 Days	58.00	50.88	7.12
B1	Group B 1-7 Days	75.00	65.79	9.21
B2	Group B 8-14 Days	72.00	63.16	8.84
B3	Group B 15-21 Days	70.00	61.40	8.60
B4	Group B 22-28 Days	95.00	83.33	11.67
C1	Group C 1-7 Days	95.00	83.33	11.67
C2	Group C 8-14 Days	90.00	78.95	11.05
C3	Group C 15-21 Days	90.00	78.95	11.05
C4	Group C 22-28 Days	88.00	77.19	10.81
CTDEMO	CT Demo	0.00	0.00	0.00

Search By: Code | Search For: [empty]

Accept | Cancel

On the Reservations Details screen, click the **"Financial"** Tab. See how Novtel has automatically inserted the price structure of the category selection into the **"Applicable Rates"**, and calculated the total invoice amount of this booking.

Now let's record the following: Mr W. Smith now wants to extend his booking by week, to the next week's Tuesday. To confirm the booking he also supplies his Credit Card information as follows:

- Credit Card Type - Visa Card
- Card Number - 1234000000000002
- Expiry Date - 0106
- CVV No - 123

He will arrive at the local airport at 8:00AM on Mango Flight 454 and requests the car to be delivered to the airport. He will return the car to our premises on the day of his departure at 8:00AM.

To extend the booking, go to the grid:

- Point the mouse to the end of Tuesday. Two arrows will appear on the edge for the booking.
- Click, hold and drag the booking to the new date of return.

To record this information let's go back to the booking on the grid. Point to the booking and double click on it.

- First, select the new category into which the booking now falls - Code: A2, Group A 8 – 14 Days, and click **"Accept"**.
- Check that the collection and return time (8AM) is entered correctly.
- Enter the address for delivering the vehicle to the client. He will return the vehicle to our premises, so enter those details as well.
- Change the status to **"Confirmed"**.

The screenshot shows the 'Reservation Details' window with the 'General' tab selected. The form contains the following fields and values:

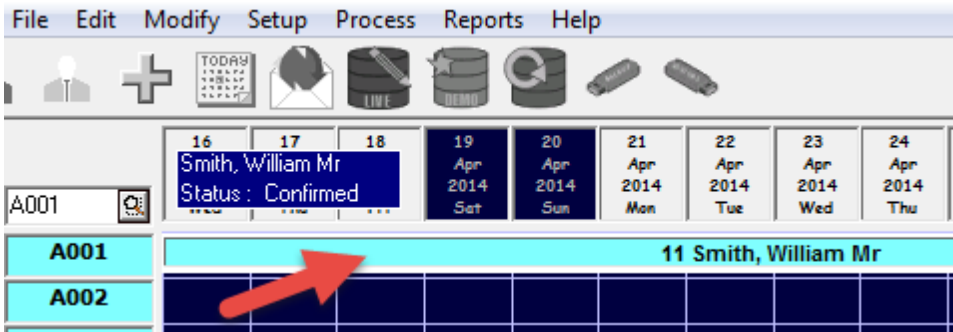
- Vehicle Number:** A001 (dropdown), Volkswagen Golf 1300 Red
- Duration Charged:** 13 (dropdown)
- Reservation Number:** 11, **RA Number:** 0
- Category:** A2 - Group A 8-14 Days (dropdown)
- Order Number:** (empty)
- Customer Code:** SMI001, Search <F5>
- Description:** Smith, William Mr
- Comments:** (empty)
- Delivery Address:** Airport 8AM.
- Pickup Address:** Our Premises
- KM Out:** 0, **KM In:** 0, **KM Used:** 0, **KM Free:** 156, **KM Charged:** 0, **Fuel Used:** 0
- Branch Out:** Demo, Europe (dropdown), **Date Out:** 2014/04/16 (dropdown), **Time Out:** 08:00:00 AM (dropdown)
- Branch In:** Demo, Europe (dropdown), **Date In:** 2014/04/29 (dropdown), **Time In:** 08:00:00 AM (dropdown)
- Estimated Time Due:** 08:00:00 AM (dropdown)
- Payment Type:** Credit Card (dropdown)
- Credit Card Number:** 1400000000000002
- Credit Card Type:** Visa (dropdown)
- Exp Date:** 0106 (dropdown)
- CVV No:** 123
- Status:** Confirmed (dropdown)
- Buttons:** View Audit Log, Accept, Cancel

Annotations on the form include:

- Change category:** A red speech bubble pointing to the 'Category' dropdown.
- Deliver the car here:** A red speech bubble pointing to the 'Delivery Address' field.
- The car will be delivered to our premises on the last day of the booking.** A red speech bubble pointing to the 'Pickup Address' field.
- Enter all Credit Card information.** A red speech bubble pointing to the 'Credit Card Number', 'Credit Card Type', 'Exp Date', and 'CVV No' fields.

Now click on the **"Financial"** Tab again, and see how Novtel has recalculated the booking cost with the newly selected category information.

The booking color has changed to light blue on the grid, due to the change in status.



Say for instance the following scenario presents itself:

Vehicle no.1 was in an accident the day before Mr W. Smith was to receive it. We now have to allocate the available vehicle no. 8 to Mr W Smith.

Point the mouse to the relevant booking; Right Click on the booking and then click "**Move**". Now click on the booking and drag Mr W. Smith's booking down to Vehicle no. 8 and release the mouse.

Mr W. Smith phones again with the details for an additional driver. Let's record these changes on the Reservations Details screen.

Point to the booking; double click on it, and click on "**Additional Drivers**".

Reservation Details

General Financial Additional Costs **Additional Drivers** Quick View

Driver 1

1 First & Last Name Mr P Willis

2 Licence Number 2123231 3 ID Number 55061222222

Passport Number

Driver 2

First & Last Name

Licence Number ID Number

Passport Number

Driver 3

First & Last Name

Licence Number ID Number

Passport Number

Copy Additional Drivers From Previous Reservation

View Audit Log Accept Cancel

Let's record the delivery billing charge: Click on the **"Additional Cost"** Tab and click **"Add New"**.

On the **"Additional Rates"** lines click the magnifying glass, select TD4 - Drop-Off 20 to 30 KM \ MI, and click **"Accept"**.

Reservation Details

General Financial **Additional Costs** Additional Drivers Quick View

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	IBA1	Standard Insurance Group A 1-7 Days	13	171.05	23.95	195.00
Item	001	Contract Fee	1	8.77	1.23	10.00
Item	AA2	Excess KM/MI Group A 8-14Days	1274	1285.18	179.92	1465.10
Item	TD4	Drop-off 31 and More KM \ MI	30	1578.95	221.05	1800.00

2 Select the correct code for this Additional Cost

1 Enter the kilometers to the Delivery Point - in this case, the Airport - were the car is to be delivered

3043.95 426.15 3470.10

Add Remark **1** Add Delete

View Audit Log **3** Accept Cancel

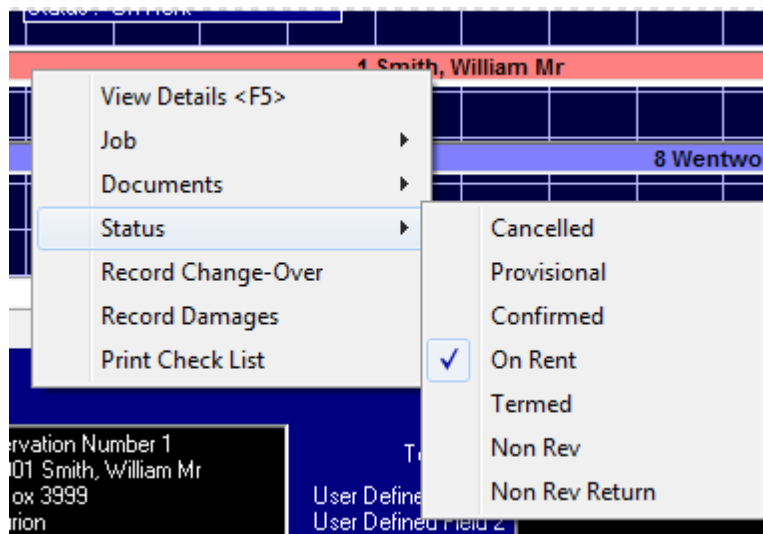
Novtel is equipped with a **"Quick View"** tab that gives an overview of the account at all times. In the active live business environment, this function is used very frequently.

Description	Qty	Tax	Excl	Incl
Fiat Palio 1300 - Red	13	98.98	707.02	806.00
IBA1 - Standard Insurance Group A 1-7 C	13	23.95	171.05	195.00
001 - Contract Fee	1	1.23	8.77	10.00
TOTAL DUE		124.16	886.84	1011.00

Try it for yourself: Make 15 – 20 bookings, and add new clients. Make bookings with "Pick-Up" and "Drop-Off" information, and complete the "time in and out sections"; Credit Card information; Additional Drivers and Costs, in order to get more acquainted with the program.

Meanwhile Mr W. Smith and his friend arrived at the Airport, and received Vehicle no. 8.

Firstly, the booking status has to change. Right click on the booking; Click on "**Status**" and select "**On Rent**". The color of the booking has changed to red on the grid.



- Secondly, record the speedometer KM \ MI out. At the time of delivery, the KM \ MI speedometer reading was at 4534 KM.
- Double click on the booking. On the "**Reservations Details**" screen, note how Novtel has already calculated the free kilometers from the category selection you made.
- Type the "**KM Out**" information in the box provided for it, and click "**Accept**".
- After the rental period, Mr W. Smith returns the vehicle. The original agreement was that the vehicle should have been returned at 8:00AM.
- Mr W. Smith only returns the vehicle at 11:00 AM. Therefore the "**Time In**" should be changed in the "**General**" Tab to the correct time in the "green section."
- Novtel automatically changes and recalculates the amount to one additional day, because of the fact that we only allow one-hour grace period for this demonstration.
- The speedometer reading is now on 5976 KM. Enter this detail as shown below. Novtel automatically calculates the excess KM driven. In this case, the access kilometers are 1274.

Reservation Details

General | Financial | Additional Costs | Additional D

Vehicle Number: A008 | Fiat Palio 1300 - Red | Duration Charged: 14

Reservation Number: 11 | RA Number: 5 | Category: A2 - Group A 8-14 Days

Order Number: | Customer Code: SM1001 | Search <F5>

Description: Smith, William Mr | Comments:

Delivery Address: Airport | Pickup Address: Our Premises

KM Out: 4534 | **KM In**: 5976 | **KM Used**: 1442 | **KM Free**: 168 | **KM Charged**: 1274 | **Fuel Used**: 0

Branch Out: Demo, Europe | Date Out: 2014/04/16 | Time Out: 08:00:00 AM

Branch In: Demo, Europe | Date In: 2014/04/29 | Time In: 11:00:00 AM

Estimated Time Due: 08:00:00 AM | Payment Type: Credit Card | Credit Card Number:

Add New Credit Card

Remarks: | Status: On Rent

View Audit Log | **Accept** | Cancel

An extra day is charged automatically for the late return of 11:00am

All that is needed now, is to click on the **"Additional Cost"** tab; Click **"Add"** and select the applicable **"Excess Rate"** and enter the kilometer quantity (in this case: 1274km) and Click **"Accept"**.

Line Type	Rate	Description	Qty	Excl	Tax	Incl
Item	IBA1	Standard Insurance Group A 1-7 Days	13	171.05	23.95	195.00
Item	001	Contract Fee	1	8.77	1.23	10.00
Item	AA2	Excess KM/MI Group A 8-14Days	1274	1285.18	179.92	1465.10

1465.00 205.10 1670.10

Add Remark **1** Add Delete

View Audit Log **3** Accept Cancel

To record the return of the vehicle, right click on the booking, and change the Status to **"Termed"**. See how the booking color changed to green on the grid.

1 Smith, William Mr

View Details <F5>

Job

Documents

Status

Update Invoice

Cancelled

Provisional

Confirmed

On Rent

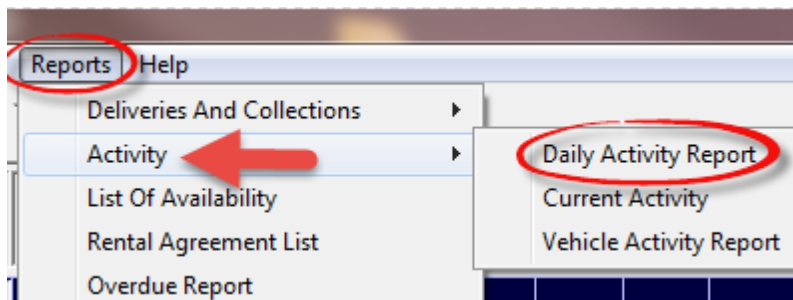
✓ Termed

Non Rev

Non Rev Return

Reservation Number 1
SMI001 Smith, William Mr
PO Box 3999
Cenurion
1111
wsmith@gmail.com

3.4.1 Reports and Search Options



Select 4 – 8 weeks to be viewed, and click "Accept".

Daily Activity Report

From 2014/03/31 To 2014/04/30

PRINTED DATE: 31 MARCH 2014 TIME: 03:25:17 PM

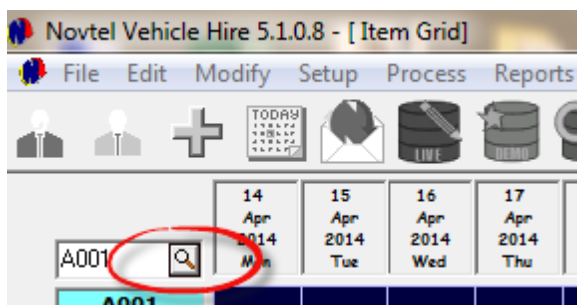
TIME	DELIVERY/COLLECTION	CUSTOMER	RES NUM	BA NUM	VEHICLE DESCRIPTION	REGISTRATION	DELIVERY/COLLECTION ADDRESS
31 March 2014							
08:00:00 AM	Delivery	Smith, William Mr	1	0	Fiat Palio 1300 - Red	ASD159GP	Airport - Virgin Flight 454
08:00:00 AM	Delivery	Watson, Jake Mr	2	0	Volkswagen Golf 1300 Red	CA999	Airport
08:00:00 AM	Delivery	Benning, Peet Mr	4	0	Honda Ballade 1600 Red	CA 565	Cape Town Airport
01 April 2014							
08:00:00 AM	Delivery	Green, Hendrik Mr	6		Mazda Soho 1300 Green	CAW369	Airport
08:00:00 AM	Delivery	Wentworth, Lee-Ann, Miss	8	0	Opel Corsa 1300 - Blue	CA288	Our Premises
02 April 2014							
08:00:00 AM	Collection	Watson, Jake Mr	2		Volkswagen Golf 1300 Red	CA999	Our Premises
08:00:00 AM	Delivery	Engelbrecht, Angela Mrs	7	0	BMW 7 Series -3.0 White	CA 825	Airport
03 April 2014							
08:00:00 AM	Delivery	De Villiers, Gordon Mr	9	0	Opel Astra 1600 Blue	BLU 978 GP	Airport
04 April 2014							
08:00:00 AM	Delivery	Van Tonder, Andre Mr	3	0	Ford Ikon 1300 Black	CY2020	Garden Route Mall
07 April 2014							
08:00:00 AM	Collection	Green, Hendrik Mr	6		Mazda Soho 1300 Green	CAW369	Our Premises
08:00:00 AM	Collection	De Villiers, Gordon Mr	9		Opel Astra 1600 Blue	BLU 978 GP	Airport
08 April 2014							
08:00:00 AM	Delivery	Steyn, Mike Mr	5	0	Audi Q7 3.0 Blue	KLA 882 GP	Our Premises

Click the arrow button as shown below, to see how the vehicle descriptions are shown. When you click the arrow again, the descriptions are hidden.

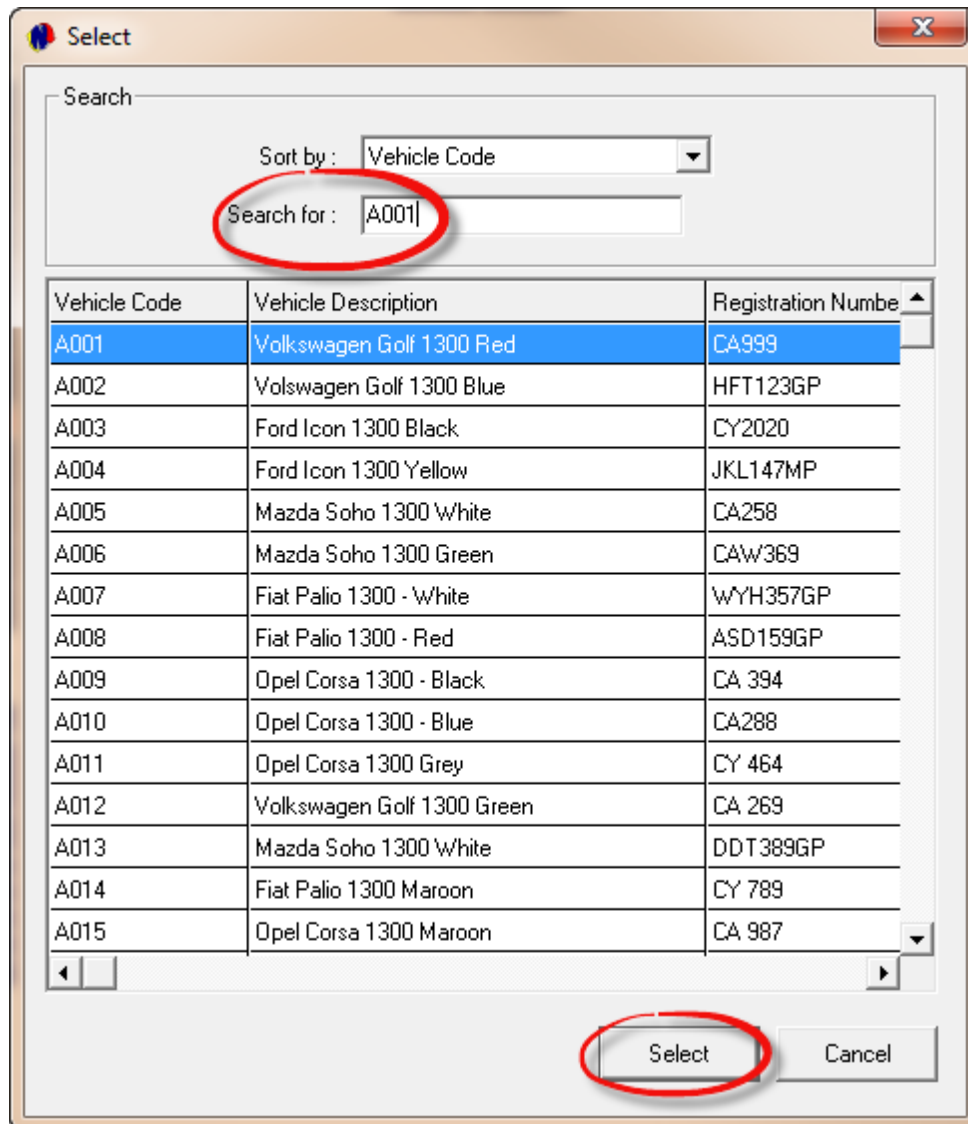
You can also edit the vehicle descriptions to see the vehicle registration numbers together with vehicle descriptions.



On the grid, directly on top of the first vehicle of the fleet, is the "**Quick Search**" button. Click on the drop down button in order to see the fleet list. Select any vehicle, and the grid will go directly to that vehicle's information.



Type B or C in the "Search For" line, and see how the grid jumps to the first vehicle of the selected group.



The screenshot shows a 'Select' dialog box with a search bar and a table of vehicles. The 'Search for' field is circled in red and contains 'A001'. The 'Sort by' dropdown is set to 'Vehicle Code'. The table lists 15 vehicles, with the first row (A001) highlighted in blue. The 'Select' button at the bottom is also circled in red.

Vehicle Code	Vehicle Description	Registration Number
A001	Volkswagen Golf 1300 Red	CA999
A002	Volkswagen Golf 1300 Blue	HFT123GP
A003	Ford Icon 1300 Black	CY2020
A004	Ford Icon 1300 Yellow	JKL147MP
A005	Mazda Soho 1300 White	CA258
A006	Mazda Soho 1300 Green	CAW369
A007	Fiat Palio 1300 - White	WYH357GP
A008	Fiat Palio 1300 - Red	ASD159GP
A009	Opel Corsa 1300 - Black	CA 394
A010	Opel Corsa 1300 - Blue	CA288
A011	Opel Corsa 1300 Grey	CY 464
A012	Volkswagen Golf 1300 Green	CA 269
A013	Mazda Soho 1300 White	DDT389GP
A014	Fiat Palio 1300 Maroon	CY 789
A015	Opel Corsa 1300 Maroon	CA 987

In order to do various searches, you can do the following:

A012

View Vehicles by
☒ Code
☐ Registration Number

New Reservation

2014/04/14 2014/05/11

Tooltip Display Customer Info

Reservation Number 11
SMI001 Smith, William Mr
PO Box 3999
Cenurion
1111
wsmith@gmail.com

Mobile Phone 085 992 4379
Fax
Telephone 012 222 3333

User Defined Field 1
User Defined Field 2
User Defined Field 3
User Defined Field 4
User Defined Field 5

Find

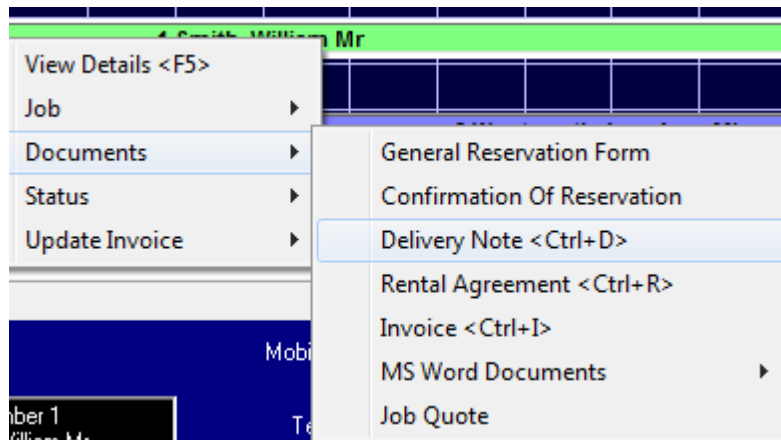
Search By Reservation Number

Reservation Number
Rental Agreement Number
Registration Number
Customer History
Supplier Invoice Number
Supplier Reservation Number
Supplier Vehicle Registration Numt
Supplier Order Number

Search
Cancel

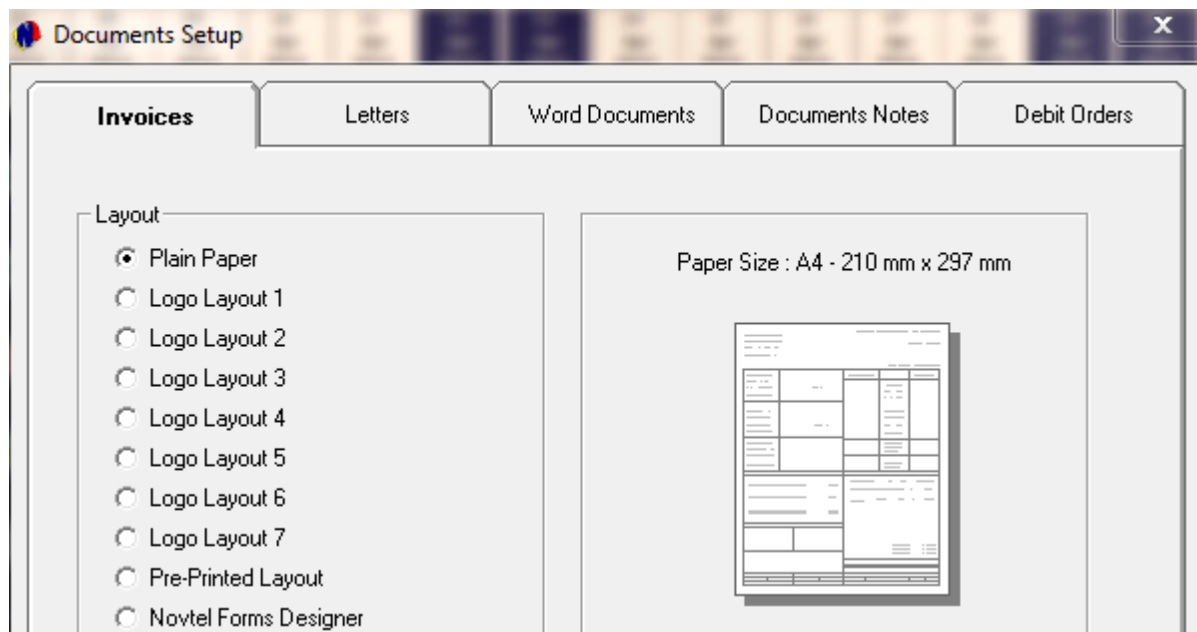
3.5 Step 5 - Novtel Documents

You might have seen that if you right click on a booking, a selection is available for documents.



To set up documents in Novtel: On the top menu click "**Setup**" and then "**Documents**".

You have 8 standard rental agreement layouts to choose from.



Own logos can be used in the standard documents. Novtel is equipped with a powerful forms designer, but is not part of this tutorial.

On the "**Letters**" tab, you can set up letters to forward to customers directly from the bookings on the grid.

3.6 Step 6 - Novtel and the financial side of things

Let's go back to Mr Smith's booking, which was "**Termed**".

To record this booking's financial information, is as easy as right clicking on it and updating it.

Bookings that carry the status of "**Termed**", are the only bookings that can be updated.



See how an invoice number appears on top of the booking as you move over it.

When Novtel is running integrated with 3rd party accounting software, this sales financial information is automatically transferred to the 3rd party accounting software package.

The invoice number displayed will be the invoice number of the 3rd party accounting package. For this demonstration, Novtel is running independently, and the invoice number is internally generated.

Now let's have a look at 2 reports:

- **Sales History**: Click Reports → Sales History → Reservation Sales History

Select the period you would like to view.

- **Income Projection**: Click Reports → Income to

Select the period you would like to see for the income projection, and also select what booking statuses you would like to see, or not to see.

INCOME PROJECTION					
Date and Time Report printed : 2014/04/01 12:23:57 PM					
Report for the period 3 March 2014 to 20 April 2014					
Res	Customer	Date Out	Date In	Status	Total
1	SMI001 - Smith, William Mr	31/03/2014	15/04/2014	Termed	R 2 387.00
2	WAT001 - Watson, Jake Mr	31/03/2014	02/04/2014	Termed	R 1 057.60
3	VAN001 - Van Tonder , Andre Mr	04/04/2014	10/04/2014	Confirmed	R 370.00
5	STE001 - Steyn, Mike Mr	08/04/2014	17/04/2014	Confirmed	R 810.00
6	GRE001 - Green, Hendrik Mr	01/04/2014	07/04/2014	On Rent	R 390.00
7	ENG 001 - Engelbrecht, Angela Mrs	02/04/2014	ListInvoices.ArrivalDate (String)	med	R 966.00
9	DEV001 - De Villiers, Gordon Mr	03/04/2014	07/04/2014	Provisional	R 425.00
					R 6 405.60

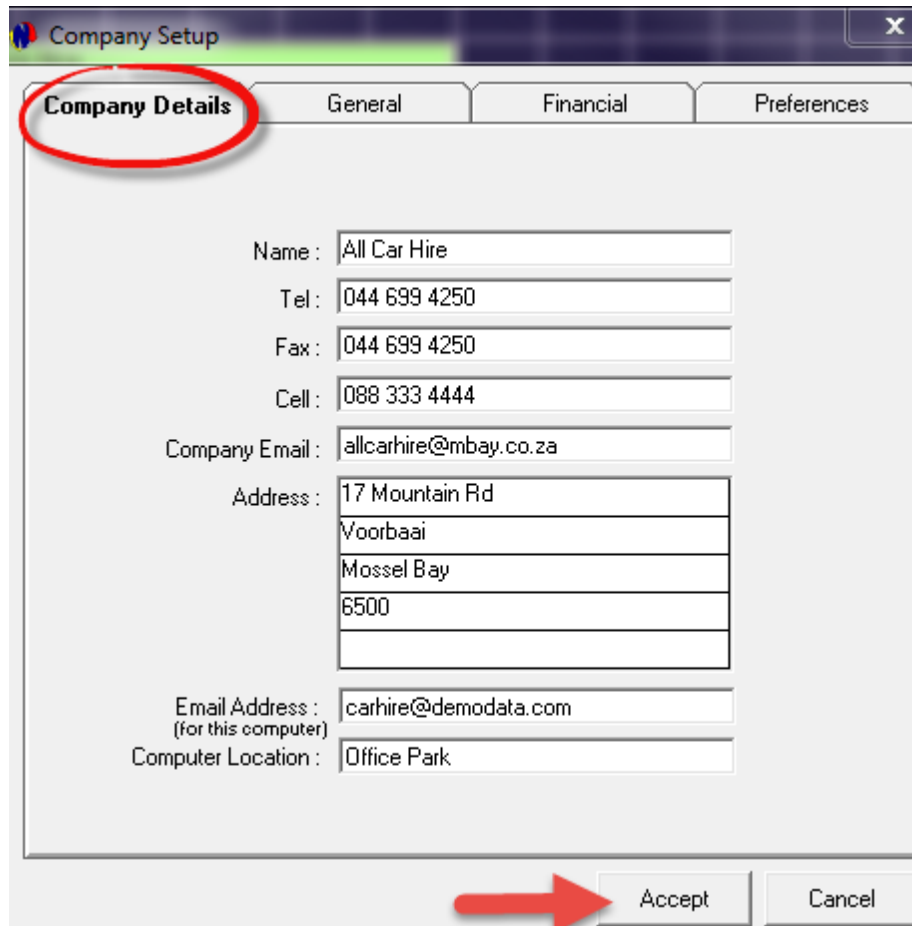
Let's go back to Mr Smith's booking and double click on it. All the fields are greyed and cannot be changed, since the customer had been "**Updated**", and the invoice was processed.

Further financial changes can be made in the 3rd party software, but as far as Novtel is concerned, the updated amount is final.

The "**Comments**" box in the "**General**" tab is left open for notes to be made in cases where credit notes are passed. Or, to record a note of traffic fines and other events, that will only come to our attention at a later stage.

3.7 Step 7 - Setting up a Company

Click on **Setup** → **Company** and enter all company details.



The screenshot shows the 'Company Setup' dialog box with the 'Company Details' tab selected. The 'Company Details' tab is circled in red. The form contains the following fields and values:

Field	Value
Name	All Car Hire
Tel	044 699 4250
Fax	044 699 4250
Cell	088 333 4444
Company Email	allcarhire@mbay.co.za
Address	17 Mountain Rd
	Voorbaai
	Mossel Bay
	6500
Email Address (for this computer)	carhire@demodata.com
Computer Location	Office Park

At the bottom right, there are 'Accept' and 'Cancel' buttons. A red arrow points to the 'Accept' button.

On the "**General**" tab of the "**Company Setup**", you can set various options - all of which are self-explanatory. The automatic refresh interval will only be used in a multi-user environment.

This is a short and basic tutorial on Novtel Vehicle Hire, aimed at first-time users of this product. When purchasing the Tutorial and Professional versions of Novtel, you obtain access to much more - such as tutorial movies, etc.

You can now apply your Novtel knowledge to your own fleet and Business.

3.8 Step 8 - How to Set-Up Multi-Branch Management

What is Multi-Branch management?

Multi-Branch management is a feature in Novtel Vehicle Hire that will allow companies with more than one branch to check the vehicle in at another branch, in order to keep track of where that vehicles is at any point in time.

Setting-Up Multi-Branch Management

By default the **"Activate Multi-Branch"** Checkout is disabled.

To set up the option to use the **"Multi-Branch"** management, click on **Setup → Company → General**

You will find the option to activate or deactivate the **"Multi-Branch"** option, by checking the check box, or un-checking it for the desired settings.

You can also setup the grace period for clients to return vehicles a little later than specified, but any later than that, and an extra day will be charged automatically.

The screenshot shows the 'Company Setup' dialog box with the 'General' tab selected. The 'General' tab is circled in red. The 'Activate Multi-Branch Checkout' checkbox is checked and circled in red. The 'Allow reservations to overlap by' spinner is set to 1 day, and the 'Allow Grace Period of' spinner is set to 2 hours, both indicated by red arrows. The 'Accept' button is circled in red.

After the setup, the changes will be noticed in **"Reservation Details."**

These screen shots represent the difference between the active and inactive use of the Multi-Branch feature:

De-activated Branch

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A008 | Fiat Palio 1300 - Red | Duration Charged: 16

Reservation Number: 1 | RA Number: 1 | Category: A2 - Group A 8-14 Days

Order Number:

Customer Code: SMI001 | Search <F5>

Description: Smith, William Mr

Comments:

Delivery Address: Airport - Virgin Flight 454

KM Out: 4534
KM In: 5976

Date Out: 2014/03/31
Time Out: 08:00:00 AM

Date In: 2014/04/16
Time In: 11:00:00 AM

Activated Branch

Reservation Details

General | Financial | Additional Costs | Additional Drivers | Quick View

Vehicle Number: A008 | Fiat Palio 1300 - Red | Duration Charged: 14

Reservation Number: 11 | RA Number: 5 | Category: A2 - Group A 8-14 Days

Order Number:

Customer Code: SMI001 | Search <F5>

Description: Smith, William Mr

Comments:

Delivery Address: Airport

KM Out: 4534
KM In: 5976
KM Used: 1442

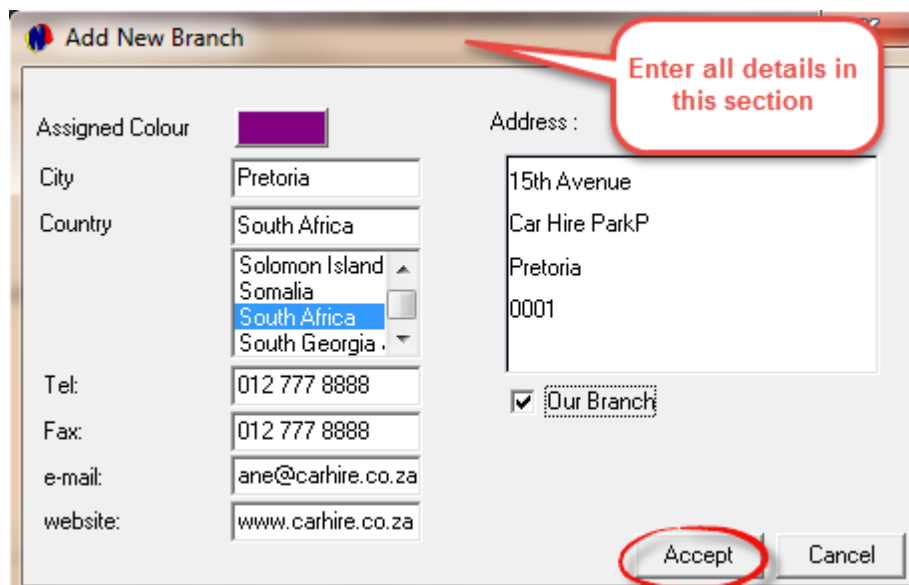
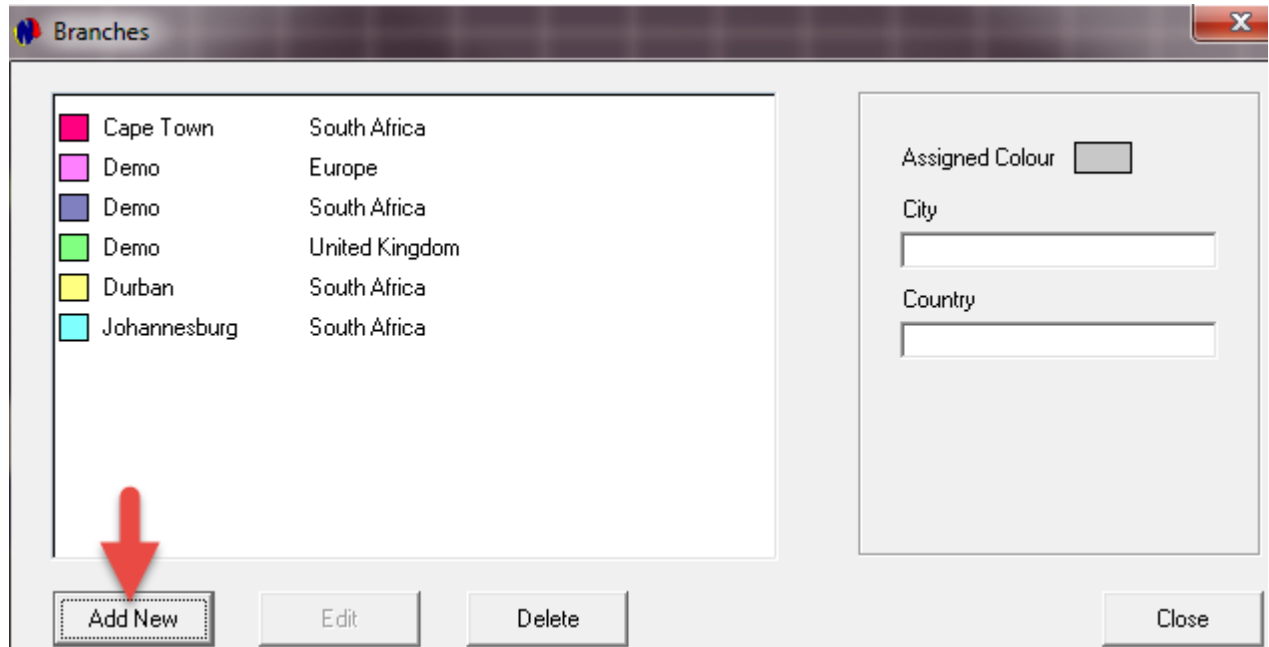
Branch Out: Cape Town, South Africa
Date Out: 2014/04/16
Time Out: 08:00:00 AM

Branch In: Johannesburg, South Africa
Date In: 2014/04/29
Time In: 11:00:00 AM

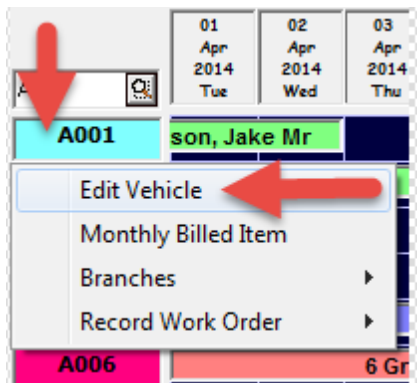
3.9 Step 9 - How to Set-Up Branches and their Colours

On the top menu, click **Edit** → **Branches**

Click on "**Add New**", choose a color and click OK.



Now: Right Click on the vehicle code on the left of the grid, and click **"Edit Vehicle"**.



The screenshot shows the 'Edit Vehicle' dialog box. The 'General' tab is selected, showing fields for Code, Description, Branch, Registration Number, Manufacturer, Category, and Type. A red callout points to the 'Branch' dropdown menu, and a red circle highlights the 'Accept' button. The 'Accept' button is circled in red.

Code: A001
Description: Volkswagen Golf 1300 Red

General | Details | Financial Fields

Branch: Cape Town, South Africa
Registration Number: CA999
Manufacturer: Volkswagen
Category:
Type: Car/Automobile

Show On Grid: ☒
Subhire Item: ☐
Monthly Billed Item: ☐
Maintenance Item: ☐
Disposed: ☐

Accept Cancel

This concludes the tutorial for the Vehicle Hire Software (Free version).



OUR PRODUCTS

Our Pastel integrating software include products for:

- Property Management
- Vehicle Hire*
- Self-Storage
- Equipment Hire*
- Relations Management*
- Hospitality*
- Contract Management
- Toilet Hire*
- Service Business Rental
- Point of Sale: Retail*
- Point of Sale: Restaurant*
- Workshop Management*
- Gate / Facility Access Control*
- Standard Operating Procedure (SOP) Management*

* Can also be used as stand-alone applications

OUR WEB PORTALS

Global Property Online and Country related Website Portals are the marketing medium between Estate Agents / Private Owners and Property Buyers / Renters. These Portals also include an Online CRM (Customer Relations Management) System:



- Global Property Online – www.globalpropertyonline.net
- Buy Property in Spain – www.buypropertyinspain.net
- Property in Portugal for sale – www.propertyinportugalforsale.com
- Australia Property – www.australia-property.net
- BLOG – www.blog.globalpropertyonline.net

NOVTEL GROUP

Company Reg. CK1996/055394/23

VAT Number: 4360161451

WWW.NOVTEL.COM

South Africa Tel: 0861 668 835

International Tel: +27 (0)44 695 4886

Fax: +27 (0)44 695 4883

E-mail: sales@novtel.com

NOVTEL HEAD OFFICE

Diaz Office Park
Block 1 Unit 30
Diaz Beach
Mossel Bay
South Africa

PO Box 916
Hartenbos
6520
South Africa

NOVTEL APPROVED DISTRIBUTORS

I South Africa I

Western Cape
Southern Cape
Eastern Cape
KwaZulu Natal
Gauteng
Northern Region

I International I

Australia
Caribbean
Kenya
New Zealand

Please visit www.novtel.com for our distributors' contact information.